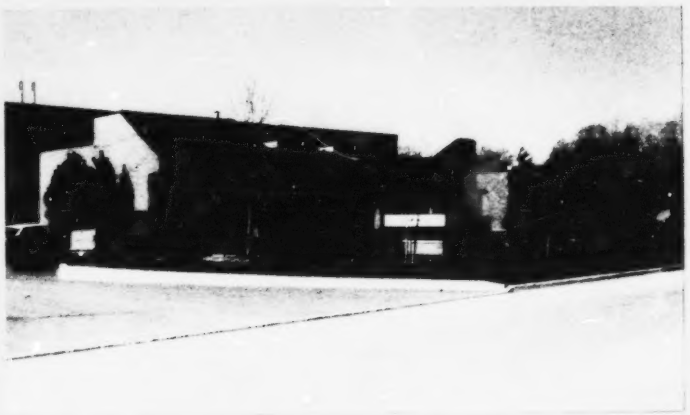

Ontario

Ministry of
Municipal
Affairs

Bernard C. Grandmaître, Minister

INDUSTRIAL TRENDS

IMPLICATIONS FOR MUNICIPAL PLANNING

87-02656/

INDUSTRIAL TRENDS

IMPLICATIONS FOR MUNICIPAL PLANNING

Ministry of Municipal Affairs
Research and Special Projects Branch

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TABLE OF CONTENTS

	Page
INTRODUCTION	1
CHAPTER 1 - STUDY APPROACH	3
. Case Studies	3
. Industrial Change in Study Municipalities	4
. Industrialists and Industrial Land Developers	4
. Synthesis	5
CHAPTER 2 - KEY FINDINGS	7
. Municipal Planning Criteria Meets Needs of New Industries	7
. Dramatic Growth in Service Sector Jobs	8
. Commercial Development in Industrial Areas	9
. Manufacturing Still a Major Force	10
. Strongest Growth in Small and Large Firms	10
. Industries Locate for Business Reasons	11
. Site Plan Control Accepted	11
CHAPTER 3 - CONSIDERATIONS FOR MUNICIPAL PLANNERS	13
. The Number of Industrial Zones Can Be Reduced	13
. The Approvals Process	14
. Amenity Retail in Industrial Areas	14
. Parking and Loading Requirements	15
APPENDIX 1 - MUNICIPAL PLANNING CRITERIA	
APPENDIX 2 - INDUSTRIAL SECTORAL CHANGE	
APPENDIX 3 - INDUSTRIAL QUESTIONNAIRE	

INTRODUCTION

In recent years, much attention has been drawn to the changing nature of industrial development. Of particular interest has been the rapid increase in the number of jobs being created in the service sector and high technology areas of the economy. Parallel with this has been a concern that the traditional manufacturing sector has been declining in Ontario.

These changes have come about as a result of a complex set of circumstances including technological change, international shifts in manufacturing patterns and changing consumer needs. These events suggested that a review should be conducted of current municipal planning criteria to see how well municipalities are adapting to the needs of the growing industrial sectors. This study examines this issue in the Ontario context focussing on new industrial areas. It must be emphasized that this study is concerned only with the situation of firms locating in new industrial areas and the same findings may not hold true for older industrial areas.

Chapter 1 outlines the major steps in undertaking the study and analyzing the results.

Chapter 2 summarizes the key findings of the study and their implications for municipal planning criteria for new industrial areas.

Chapter 3 suggests some areas where municipal planning criteria and the planning process might be improved to deal with the needs of the new growth industries.

The **Appendices** contain background material regarding municipal planning criteria, industrial sectoral change and the industrial survey questionnaire.

Chapter 1

Study Approach

Case Studies

In order to make the study as practical as possible, case studies were used. The criteria established to assist in the selection of suitable communities were:

- the municipalities had to have experienced significant industrial growth in the last 10 years, particularly in the growing industrial sector categories: transportation and communication, computers and related technology, wholesale and retail trade, personal and business services;

- to the extent possible, a geographic representation across the province was desired;

- the municipalities had to vary in size;

- the municipalities had to vary in age and state of development.

As a result of applying these criteria, six municipalities were chosen for the study. These were: Mississauga, Markham, Etobicoke, Caledon, Kanata and Cambridge. The preponderance of case study municipalities in the greater Metropolitan Toronto area reflects the continued strong growth rates of this region.

Planning and development officials in each municipality were contacted and interviewed to obtain information on official plan policies, zoning by-law requirements and site plan control criteria for new industrial areas. As well, general discussions were held regarding each municipality's recent experience in dealing with industrial locational requirements and problems. Of particular concern was the identification of any consistent issues or amendment requirements which

might indicate a need for changes in policy or physical planning criteria.

Official plan policies, zoning by-law requirements and site plan control criteria for each municipality are included in Appendix I.

Industrial Change in Study Municipalities

Identifying the changing nature of industrial growth was a key component of the study. Industrial sectoral change for Ontario and the six case study municipalities was obtained for the years 1974-79, 1979-84 and 1974-84 using the services of the Dun & Bradstreet organization. The years between 1974 and 1984 were selected because they covered a period of dramatic change in Ontario's industrial development including the recession years of the early '80s.

The Dun & Bradstreet data base uses the United States Standard Industrial Classification (SIC) system.[1] The data collected was at the 2-digit level which includes 99 industrial classifications and provides good coverage of a broad range of job categories. The data, however, can be used only to determine trends and not absolute values since it is compiled only from responses to questionnaires returned by industries.

Statistics for both employment change and firm change were used as the measures of growth or decline. These were determined by both percentage change and numerical change for Ontario and the six case study municipalities. Pertinent data related to sectoral change are contained in Appendix 2.

Industrialists and Industrial Land Developers

The final step in the process was to obtain information from industrialists and industrial land developers on their experiences and problems in dealing with the municipal planning process. To the extent possible, the industries contacted had to have located in the municipality within the last five years so that recent experiences could be examined.

The industrialists represented, for the most part, single firm operations which had located and built in a particular municipality within the last five years. The industrial land developers contacted were those who develop land for lease or sale, or as a turn-key operation.

From the analysis of the Dun & Bradstreet data, industrialists were selected for the study who were representative of one of each of the growing industrial sectors. A questionnaire was designed to obtain information on:

- characteristics of the firm including type of operation, size, number of employees, etc.;
- locational considerations (why they had chosen a particular municipality or site);
- their physical requirements (servicing, transportation, office space provisions, parking, special needs, etc.);
- experience in dealing with the planning process in that particular municipality.

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1. National Bureau of Standards, *Federal General Data Standard, Representations and Codes* (Springfield, Va.: Department of Commerce, 1979)

The questionnaire was followed up by interviews with appropriate personnel in each firm. A similar process was used in obtaining information from industrial land developers.

The questionnaire sent to the industrialists is included in Appendix 3 of the report.

Synthesis

All of this information was synthesized through the use of standard statistical analysis in order to determine the relationship between the needs of the growing industrial sectors, as represented by the developers and firms interviewed, and current municipal planning practice.

Chapter 2

Key Findings

Municipal Planning Criteria Generally Meeting Needs of New Growth Industries

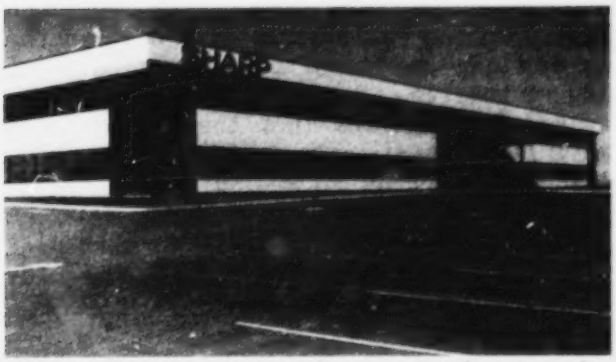
Based on the results of the survey work, it is evident that municipal planning criteria reflected in official plans, zoning by-laws and site plan control requirements, are generally adequate to meet the needs of firms representative of the growing industrial sectors in new industrial areas. There are several reasons for this.

First of all, planning controls and guidelines are broad and flexible enough to permit the establishment of a wide variety of industries within new industrial areas. Official plans, by their nature, contain only general policies on industrial uses and, in fact, usually support and encourage new industrial development. Zoning by-laws, as evidenced in the case study municipalities, are detailed and extensive, but cover such a broad range of categories that they accommodate most industrial uses. There are some specific concerns regarding zoning by-law provisions, however, and these will be discussed in the next chapter. Site plan control criteria are also fairly rigid, but have not presented a serious problem.

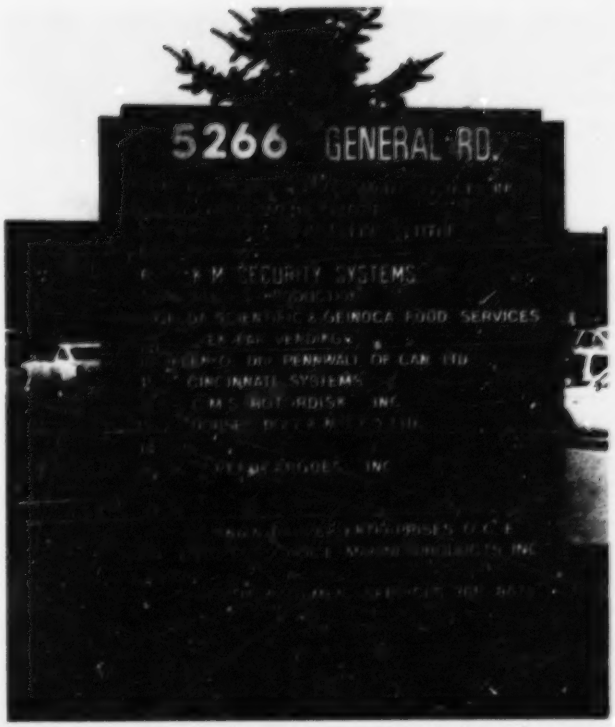
Second, planning criteria are remarkably similar among the case study municipalities. A major reason for this is that all municipalities are subject to the same provincial planning legislation and, fiscal restraints and requirements. This tends to create a similar planning approach towards industrial development. It is also obvious that municipalities benefit from each other's experiences and the similarity in many standards is probably a reflection of municipalities sharing information. The differences that do exist have little or no impact on industries as far as locational decisions are concerned.

Finally, municipalities appreciate the value of new industrial development. Industrialists and industrial land developers receive positive receptions from municipal officials and politicians. Thus, any amendments which may be required by the industry are handled, as far as the municipalities are concerned, in an expeditious and cooperative manner. This is not always the way the industries see the process, however.

The above findings do not mean that municipal planning criteria are ideal in terms of industrial needs, only that a majority of the industrialists and industrial land developers had little or no problem with the system. Areas where outstanding issues still remain are covered in subsequent sections of this chapter and Chapter 3.



High technology industries are having a major impact on new industrial areas.



A wide variety of service sector industries now locate in industrial parks.

Dramatic Growth in Service Sector Jobs

By any measure, growth in the service sector has been dramatic. The service sector as defined by the SIC codes used in the Dun & Bradstreet data include: transportation, communications and utilities; wholesale and retail trade; finance, insurance and real estate; community, personal and business services; and public administration (government). For the purposes of this study, government was not included in the analysis since this function would not normally locate in industrial areas.

In terms of the number of jobs created and new firms established, the growth in most of these sectors has been exceptional. For example, during the 1974-84 period for Ontario overall, employment in transportation, communications and utilities grew by 39.6%, in wholesale by 28.8%, in retail by 22.1% and in the general service category by 112.6%. This is also the case among the case study municipalities. Only the category of finance, insurance and real estate services showed no significant growth in jobs in Ontario. Tables 1 and 2 of Appendix 2 indicate relative growth rates at the one digit level for Ontario

and the case study municipalities by both employees and firms over the study period.

Commercial Development in Industrial Areas

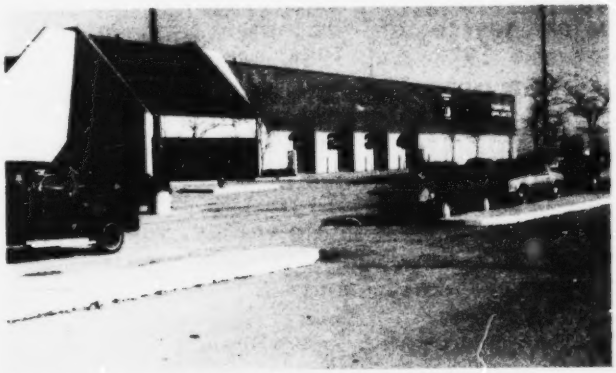
These statistics clearly indicate that the service sector has been the major performer in creating new jobs in Ontario over the past decade. The implications for municipal industrial planning policy are not so clear. As can be seen from the types of firms which make up the service sector, many would not normally locate in typical industrial areas. They would be more oriented to locating in commercial or institutional zones.

Most municipalities like to keep their industrial areas in traditional uses, i.e. permitting basically manufacturing and warehouse type operations. One of the difficulties in forming planning policies for new industrial areas is that, for economic reasons, many of the service sector industries now want to locate in industrial areas. The issue comes down to how much office and retail use should be permitted, if at all.

In all of the case study municipalities, office use is permitted in industrial areas to a greater or lesser extent, depending on the specific zone. This is usually in conjunction with an existing industrial operation. The problem that municipalities have to deal with is what to do with free-standing office space which may be occupied by quasi-industrial uses such as data processing, communications services or other functions relating to changing technology.

Some municipalities have attempted to overcome this problem by designating special purpose industrial zones which permit both traditional and quasi-industrial uses. These are often the "prestige" industrial zones with high standards of site design and are usually referred to as business parks. This is a partial solution, but does not answer the larger question of how these uses should be treated from a land use point of view.

The question of retail use in industrial areas is even more contentious. The proliferation of factory outlets for furniture, appliances, hardware and other types of consumer goods in industrial areas has grown dramatically over the last few years. All of the case study municipalities, except Kanata and Etobicoke, allow a certain amount of retail use directly associated with a manufacturing or wholesaling concern. However, over the years, this distinction has become blurred



Large retail/wholesale outlets now want to locate in industrial areas.

and retail/wholesale uses of large size are now common in many industrial areas.

Here again, municipalities have tried to deal with the problem in two ways: first of all, through the designation of certain types of zones which specifically allow these types of uses or secondly, through exemptions.

The issue of commercial uses in industrial areas has not been resolved in a manner that is satisfactory to either industry or the municipalities, if the case study

municipalities are typical. This is obviously a complex issue which must be dealt with in the context of each municipality's needs. As stated, municipalities have been trying to deal with the issue through various zoning techniques. The realities of continued service sector growth, however, indicate that the current rather rigid definitions of industry in municipal planning documents may have to be reviewed.

Manufacturing Still a Major Force

Despite the concerns regularly expressed through the media, manufacturing remains a major source of employment in Ontario. Between 1974 and 1984 manufacturing employment actually grew, although at a much slower rate than other sectors. In the recession period of 1979-84, however, there was a significant downturn in manufacturing employment in the Province and in three of the case study municipalities. For many municipalities, this downturn will likely continue.

New manufacturing development has been concentrated, particularly in the regions surrounding Metropolitan Toronto. Municipalities elsewhere have had to become more aggressive to attract new firms. Indeed, many are struggling just to retain existing manufacturing firms.[2]

However, since the manufacturing sector remains a vital economic force in many municipalities, municipal planning criteria should continue to recognize its importance.

Large manufacturing plants of high quality design can be attractive, and compatible with other uses.

Strongest Growth in Small and Large Firms

In Ontario overall, there is a growing polarization between the growth in the number of firms and the growth in the number of employees in each industrial category. The greatest growth in the number of firms occurs in the 0-9 employee category, while the greatest growth in the number of employees occurs in the 250+ employee category. The growth in the 250+ employee category of firms is due mainly to plant expansion, rather than new plant construction. Province-wide growth and/or decline has been moderate in mid-size firms. Table 3 of Appendix 2 presents the industrial categories which have shown either significant growth or decline between 1974 and 1984.

The growth in the number of small firms reflects growth in the service sector and has implications for municipal planning policies. Many of these small firms are

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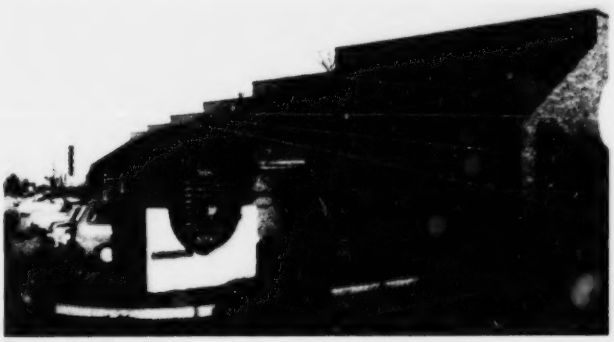
2. For further discussion on this topic see: Ministry of Municipal Affairs, *Older Industrial Areas - Planning for Improvements* (Toronto, 1986)

accommodated in rental space in industrial multiples, a trend that has caught on in some municipalities.

Others are locating in small, stand-alone buildings. It is difficult to coordinate site plan control over many small developments occuring over time and in a piecemeal fashion. The municipality will have to ensure that this type of development is built to standards similar to larger industries so that they do not detract from the overall appearance of the industrial area.

The growth of employment in large firms due to plant expansion would not have the same impact on municipal planning policies since most large firms acquire more land than needed when initially building. Thus, expansion can usually proceed without land purchase or planning amendments.



Multiple unit complexes are ideal locations for small service sector firms.

Industries Locate for Business Reasons

All of the industrialists and industrial land developers surveyed indicated that they based their locational decisions on business factors. These included:

- cost of land/leasing;
- taxes;
- availability of trained labour force;
- location (access, proximity to markets and suppliers, proximity to urban centres);
- image/prestige considerations;
- personal considerations of management;
- need for expansion space.

From the surveys, it is clear that municipal planning criteria have little bearing on the locational decisions of industry. Even within a municipality, the specific characteristics of a site are usually more important than the planning requirements. Most municipalities have a surplus of industrially-designated land and thus, a prospective industry usually has several sites to choose from.

There would appear to be little use in tailoring industrial areas, through zoning or other techniques, to attract specific types of industry. Rather, municipalities should be prepared to react to the needs of prospective industries as required.

Site Plan Control Accepted

One of the most significant changes that has occurred in industrial park development over the past decade or more, has been the application on a broad scale of site plan control criteria. All of the case study municipalities have site plan control provisions for industrial areas, with the larger ones having extensive and sophisticated guidelines.

While some industrialists regarded these as a burden, most accepted the need for some form of urban design control over new development. In fact some industrial land developers apply site plan criteria that are even more stringent than those normally applied by municipalities and, in fact, have led the way for municipal standards.

One of the reasons that relatively sophisticated site planning standards are now common for new industrial areas is that both industry and the municipalities recognize the value of good site design. Image and prestige are now important considerations for a wide variety of industries besides those of the typical prestige nature. Even manufacturing

Parking areas should be buffered and landscaped to enhance the streetscape.

industries want to project a good image to their clients and the public in general. This is now possible because the nature of manufacturing has changed so that their operations are less intrusive.

Concern over site plan control which some industries expressed relates mainly to the fact that guidelines were sometimes vague

High quality urban design makes industrial complexes attractive and inviting.

or appeared to be applied in an uneven manner. Overall, industries recognized the need and value of some form of site plan control.

Chapter 3

Considerations for Municipal Planners

Municipal planning criteria generally meet the needs of industries locating in new industrial areas. A majority of industries, in fact, indicated no problems at all. There were, however, some areas identified where improvements in planning policies may be appropriate. This chapter looks at those which became apparent during the study.

The Number of Industrial Zones Can Be Reduced

Most municipalities have attempted to fine-tune their industrial categories to cover all angles as far as new industrial development is concerned. This has resulted in some municipalities having as many as seven industrial categories defined in their zoning by-laws. To some extent, this is a result of history as municipalities added new categories over time and as new industrial areas were formed. It is also true that some municipalities have neglected their industrial areas because of other more pressing issues.

The trends identified in this study indicate that fewer industrial categories are needed. Manufacturing processes have changed and strong environmental standards for all types of industry mean that many, once incompatible industries, can now coexist. For example, there is no reason why uses such as offices, clean manufacturing plants and service sector functions such as printing operations and courier services cannot locate in the same area provided adequate planning criteria are established. As indicated in the previous chapter, even traditional manufacturing industries are now concerned with the appearance of their plants and property.

Thus, there would not appear to be a need for the degree of segregation of industrial uses now common.

To some extent, reducing the number of zones may help deal with the issue of mixing quasi-industrial service sector industries into industrial areas without the usual concern over the loss of industrial land. The trend toward further growth in the service sector of the economy is likely to continue and the elimination of unnecessary zoning barriers would appear to be in step with this trend. It would also help reduce the number of industrial applications which would benefit both the industries and the municipality.

Obviously, particularly large and intrusive industries, such as wrecking yards or refineries, will still need to be segregated. However, these are rare developments which have to be handled on a case by case basis. In general, it would appear that two or three categories should be sufficient to take care of the needs of most municipalities.

The Approvals Process

The most frequent concern that industrialists and industrial land developers expressed with the municipal planning system was the approvals process. While the majority indicated they were satisfied with the way their applications were handled, there were some concerns expressed over the length and complexity of the process. Site plan control requirements were most frequently mentioned.

From the interviews with industrialists and municipal officials in the case study municipalities, it would appear that an average of 6 to 8 weeks is required for an application to be approved, depending on the extent and nature of amendment required. This is a relatively short period when compared with the length of time needed to process a typical residential application.

However, for those not familiar with the system, the approval process can be a confusing situation. This was found to be particularly true for the first time industrial applicant who may go through the process only once. It should be pointed out that problems arise with other departments besides planning, and it often appears to the newcomer that there is a lack of communication between the various departments.

Any improvements that could be made to the approvals process would help improve the municipality's image with industry. This reflects on the administrative system of the municipality. Many industrialists pointed out the value of an industrial or business development officer who could take the lead in steering the new industry through the system. Whether coordinated by the planning department or a business development officer, it would appear that a designated approvals facilitator, particularly for the first time applicant, would be a definite asset to the municipality.

Amenity Retail in Industrial Areas

Another concern that is apparent when looking at new industrial areas is the lack of personal shopping for employees. Industrial establishments very often have short lunch hours and are located in areas of the municipality remote from commercial districts. In meetings with industrialists, it was expressed several times that employees had difficulty conducting even such basic activities as banking.

Municipalities are reluctant to allow retail uses in industrial areas because of the competition this would create with existing commercial areas. However, it

would appear that a limited amount of amenity services such as banks, restaurants and convenience stores could be allowed in new industrial areas for the convenience of employees. Permitting a limited number of retail facilities, under tight planning control, would be of definite benefit to the employees in industrial areas without seriously infringing on the activities of established commercial areas.

Large industrial areas need convenience services for employees.

High technology and service sector industries usually require considerable amounts of parking.

Parking and Loading Requirements

Of all the zoning requirements placed on new industries, the ones that were mentioned most frequently as causing problems were parking and loading. Most municipalities have fairly complex formulae for determining parking and loading requirements for industrial uses. These are usually based on some form of gross floor area calculation.

In some cases it would appear that these requirements do not meet the needs of new industries because they are based on the parking and loading needs of traditional manufacturing operations. This results in parking standards which may be too high for new highly automated manufacturing firms or too low for labour intensive service sector and high technology industries.

Parking requirements in the case study municipalities varied from approximately 1 space per 1000 sq. ft. to 3 spaces per 1000 sq. ft. of gross floor area. This range of standards is similar to those found in studies undertaken by the Urban Land Institute[3] which examined new industrial and business park developments in the United States and Canada. These studies also expressed similar concerns regarding the need for more flexibility in parking requirements.

It is not possible to develop a magic

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3. Urban Land Institute, *Business Parks* (Washington, D.C., 1970)

   Urban Land Institute, *Industrial Development Handbook* (Washington, D.C., 1975)

formula which will suit all needs. However, one possible approach to parking and loading requirements may be to develop criteria based on the type of industry being built, rather than its physical size. This would allow for adjustments that would better fit individual industrial needs and help avoid time-consuming amendment applications.

One way of achieving a more flexible standard without undertaking site by site studies would be to compare new development requirements with those of similar existing types of industries to determine the actual parking demand. This would result in standards more reflective of current parking demand for various types of industrial use. The same principles could be applied to loading requirements.

Some caution must be exercised in using this approach, since individual building and sites may change use over time. However, by using the standards identified through the comparative process as a base, with some adjustment for potential uses which may produce greater demand, a more realistic parking standard may be developed.

This report has reviewed the current trends in industrial growth and development in Ontario and six case study municipalities. It has indicated the experiences that both municipalities and industry have had in adapting the planning process to the changing needs of new industrial development. The last chapter provides some direction, based on the report findings, regarding improvements that municipalities can make to their planning criteria and process.

No two communities are alike and specific planning policies regarding new industrial areas should be based on a review of the unique situation in each municipality. It is hoped that the findings of this report will assist municipalities in undertaking such studies.

APPENDIX 1

MUNICIPAL PLANNING CRITERIA

TABLE 1

OFFICIAL PLAN PROVISIONS

	CALEDON	CAMBRIDGE
INDUSTRIAL LAND USE CATEGORIES	. 2	. 2
DESIGNATED ACRES OF INDUSTRIAL LAND	. 934	. 1,900
INDUSTRIAL PARKS	. 1	. 4
ENVIRONMENTAL ISSUES	. To preserve and conserve the unique and sensitive natural environment of the Town and create a greater awareness of sound environmental and ecologic planning for the betterment of all citizens.	. Existing urban land and building resources, and their supporting public services and facilities infrastructure, to be used as fully as possible prior to the establishment of new development areas.
	. To enable development, particularly housing, to be provided on the basis of various types and levels of service in order to accommodate the needs of the present and future residents of the Town of Caledon.	. Available energy resources to be used as efficiently as possible and energy-efficient land use and building techniques to be employed.
	. To permit growth and development in the designated areas only where provisions have been made for appropriate transportation, water, and sewerage facilities, educational facilities, police and fire protection, garbage collection, snow removal and other maintenance facilities as may be required by such growth and development.	. Existing land and building resources in the city centre and other established centres of the community activity to be restored to their traditional function in preference to the dispersal of such activities or their duplication in outlying or peripheral areas.
	. To encourage a sound and diversified economic base of agricultural, commercial and industrial assessment in the Town.	. Acknowledged heritage resources to be protected for the enjoyment and enlightenment of future generations.
	. To control the rate of growth in population in any one year commensurate with the ability of the Town to ensure adequate services and economic and administrative controls.	
GENERAL INDUSTRIAL POLICY	. To provide a sound economic and employment base to meet the needs of the Town.	. Class 1 industrial use district should be reserved for uses which can benefit from the visual prominence of a location in a highway corridor and likely to enhance the visual appeal of the City of Cambridge.
	. To provide for the location of industry in such a manner as to utilize the services provided by the Town to the maximum.	. Class 2 industrial use districts may be developed and used for any other industrial activity which may be permitted.
	. To provide for the continuation of presently licenced mineral extractive operations while at the same time ensuring that future operations shall be satisfactory to the Town in terms of location, extractive practices, accessory uses and after-use.	
	. To stress the need for progressive rehabilitation of existing, as well as abandoned extractive industrial areas.	

Source: Royal LePage Real Estate Services Ltd., Research and Analysis.
Each of the Municipalities Official Plans

TABLE 1 (Cont'd)

OFFICIAL PLAN PROVISIONS

	MARKHAM	MISSISSAUGA
INDUSTRIAL LAND USE CATEGORIES	. 2	. 4
DESIGNATED ACRES OF INDUSTRIAL LAND	. 4,265	. 18,216
INDUSTRIAL PARKS	. 4	. 23
ENVIRONMENTAL ISSUES	. To accommodate the population and development anticipated for the Town in the Plan period and to provide the necessary services and facilities required by the present and future population.	. To provide a physical environment compatible with human activities in the City, and to locate new development so that the physical disturbance to existing development is kept to a minimum.
	. To maintain and strengthen both existing community identities and the identity of the Town community as a whole and to provide for anticipated future growth within the confines of compact urban envelopes.	. To avoid locating residential development in areas which will be adversely affected by obnoxious atmospheric and noise pollution and to provide for the movement of people and goods so as to minimize disruption and inconvenience to residential areas.
	. To protect, preserve and improve the natural environment and to protect residents from nuisance and dangers due to the environmental pollution and misuse of land.	. To phase development to efficiently use existing facilities and create a cohesive urban fabric and to phase new urban development so that the number of Districts in the process of being developed is at all times compatible with available municipal resources.
		. To ensure that new development is a contiguous extension of the existing urban area and to ensure that the costs of new development are equitably distributed.
		. To locate new development so that the cost of providing services is kept to a minimum to ensure generally that capital costs of facilities required by new development are borne by those whom the facilities will serve. To control the rate of growth so that municipal costs are maintained within the acceptable limits.
GENERAL INDUSTRIAL POLICY	. The permitted uses must be conducted in a manner which will not cause excessive pollution from smoke emission, noise, odours, or any other form of pollution. The appropriate standards and requirements of the Ministry of the Environment shall be adhered to and shall be the minimum acceptable standard.	. No use that is likely to cause air pollution, odour, or excessive noise will be permitted adjacent to a designated residential district.
	. Uses which, because of their nature or the materials used are considered a noxious trade, business or manufacture under The Public Health Act or related regulations, shall generally not be permitted.	. The development of commercial facilities will not be allowed to interfere with the establishment of District and Neighbourhood centres.
	. Truck terminals may be located in industrial areas, provided such location is close to arterial roads, with visual screening of the parking and storage areas, and provided they are not located adjacent to residential uses.	. Buffering will be required to ensure visual compatibility between uses, and fencing will be required, where necessary, to ensure safety. Retail warehouses are permitted provided that the establishment of these uses will not require existing industrial uses to modify their operations.
	. Visually obnoxious uses including outdoor storage shall be confined to areas secluded from residential areas and screened from public view. These shall be located so that no adverse effects will be felt in the surrounding areas.	. A high standard of building design will be required and all undeveloped parts of lots will be landscaped. Activities will be located and buildings designed to present a prestige image.
	. Council shall require visual separation, adequate setbacks, use of appropriate building materials and landscaping of industrial developments which abut open space, residential and commercial areas or arterial roads.	. Office buildings, hotels, motels, conference centres, and sports facilities will not be permitted if the establishment of such uses will require existing industrial uses to modify their operations and if the traffic generated is incompatible with the capacity of access roads.
	. Where permitted, open storage areas shall be screened by planting, fences, buildings or landscaping, and shall generally only be located in the rear yard. Adequate paved off-street parking shall be provided.	

TABLE 1 (Cont'd)

OFFICIAL PLAN PROVISIONS

	ETOBICOKE	KANATA
INDUSTRIAL LAND USE CATEGORIES	. 1	. 1
DESIGNATED ACRES OF INDUSTRIAL LAND	. 8,300	. 710
INDUSTRIAL PARKS	. 10	. 4
ENVIRONMENTAL ISSUES	. Every effort will be made to insure that industries locating in proximity to residential areas will be those with little or no air and noise pollution potential.	. In site development all effort shall be made to retain healthy trees, woodlots, rock outcrops and similar landscaping features through the judicious siting of buildings, parking lots and loading areas.
	. The development of industrial lands adjoining Highway No. 427, Finch Avenue, Albion Road, and the Etobicoke Parkway (Highway No. 27), will be encouraged to take place in an attractive and prestigious manner with provision made for generous building setbacks, landscaping, and wherever possible, for site plan control. Restricted commercial development, such as offices and motor hotel facilities, may be permitted in the vicinity of Finch Avenue and the Etobicoke Parkway.	. The plan recognizes the desirability to retain as much as possible, existing and mature tree stands and proposes that the retention of these and other natural features shall be approached as a problem of resource management. The demand for relatively clear building lots and the construction of roads, services, and parking lots will require the sensitive preservation of that which is both desirable and practical through the judicious siting and planning of lots and the physical structures to be located thereon. The obligations of owners respecting this matter will be spelled out in subdivision or site plan agreements.
	. The division and development of vacant industrial land should conform to the plans and policies set out in the Master Roads Plan for the City of Etobicoke.	. All land uses shall be limited with respect to environmental nuisance factors; including visual, air, noise, water or any other form of pollution or undesirable impact.
	. Industrial shall mean that the predominant use of the land in areas so designated shall be for manufacturing, the extracting and processing of raw materials, repair workshops, and storage of goods. Commercial uses, public uses, recreational uses, and institutional uses, etc., which primarily serve industrial uses in areas designated industrial and which in no way contribute to the detraction of the area for sound industrial development, will also be permitted.	
GENERAL INDUSTRIAL POLICY	. Permitted uses on industrial land include establishments involved in manufacturing, extraction, and processing of goods and materials, storage of goods, and repair workshops.	. Provisions shall be made in the zoning by-law to minimize the potential detrimental impact of industrial development on adjacent residential uses by means of increased setbacks; extensive screening or berming; judicious siting of buildings, structures, parking and loading areas or any combination thereof.
	. Permitted ancillary uses include commercial, public, and institutional facilities which provide service to industrial establishments or employees, and commercial recreational uses which, although they provide a service to the community as a whole, are compatible with industrial establishments.	
	. Licensed day nurseries and nursery schools and similar uses being operated from existing residential structures are situated in areas of a light industrial character.	
	. Limited office development which, by virtue of scale and function, is compatible with the industrial environment shall be permitted in all industrial areas subject to appropriate standards set out in the Zoning By-Law governing the intensity of use permitted and specific development requirements.	

TABLE 2

ZONING BY-LAW PROVISIONS

PROVISIONS	CALEDON	CAMBRIDGE
Number of Zones	. 5	. 7
Specific Exclusions	. Autowrecking, noxious uses and toxic waste disposal sites.	. Stock yard, or any use which constitutes an offensive trade within the meaning of the Public Health Act.
Allowable Coverage	. 10%-50%	. Depends on parking and yard requirements.
Percentage of Office Space Permitted	. 100%	. 100%
Percentage of Retail Space Permitted	. 20% maximum retail if adjacent to factory.	. 20% maximum if adjacent to factory.
Parking	. Ranges from one parking spot for every 484 sq. ft. of GFA (gross floor area) to one stall for every 1,000 sq. ft. GFA.	. 20% of lot area; for business and professional offices, 3 spaces per 1,074 sq. ft. of gross leasable commercial floor area.
Loading	. 1 dock - 4,520-25,025 sq. ft. GFA . 2 docks - 25,025-50,053 sq. ft. GFA 1 dock for each additional 50,053 sq. ft. GFA.	. 1 - 3,230-21,528 sq. ft. GFA 2 - 21,529 sq. ft. or more GFA 1 dock for each additional 21,528 sq. ft. of GFA.
Landscaping (minimum)	. 5%-25%	. 10 ft. strip across front lot line, special requirements when land adjacent to sensitive land uses.
Outside Storage	. Permitted except in the Prestige Industrial zone.	. Where permitted, must be located behind the regulatory building line if in front yard, then must be screened from view by one or any combination of a solid fence or wall or earth berm not less than 8.2 ft. in height.

Source: Royal LePage Real Estate Services Ltd., Research and Analysis
Zoning By-laws of each of the municipalities

TABLE 2 (Cont'd)

ZONING BY-LAW PROVISIONS

PROVISIONS	ETOBICOKE	KANATA
Number of Zones	. 3	. 4
Specific Exclusions	. Uses obnoxious because of the emission of odour, dust, smoke, noise, gas fumes, cinders, vibrations refuse matter or water-carried waste or the deterioration of explosives.	. Noxious uses and uses detrimental in appearance or in effect to surrounding uses.
Allowable Coverage	. Depends on parking and yard requirements.	. 45%, minimum lot area 43,000 sq. ft.
Percentage of Office Space Permitted	. 100%	. 100%
Percentage of Retail Space Permitted	. No retail permitted.	. No retail uses permitted.
Parking	. One space per 1,000 sq. ft. GFA for industrial uses, 3 spaces per 1,000 sq. ft. of GFA for office uses.	. 1.5 parking spaces for every 1,000 sq. ft. of floor area, but not less than one parking space for every three employees (manufacturing or industrial uses only).
Loading	. Minimum of one loading dock for every building.	. 1 - 0-3,000 sq. ft. GFA 2 - 3,000-30,000 sq. ft. GFA 3 - 30,000-80,000 sq. ft. GFA 3 plus one additional dock for each additional 80,000 sq. ft. of GFA or portion thereof.
Landscaping (minimum)	. First 15 ft. of front yard must be landscaped.	. If land abuts residential use, 30 feet of landscaped open space is required; fencing may also be required.
Outside Storage	. 10% of total lot area in IC1 zone, no maximum in IC2 and IC3.	. Up to 50% of lot area where permitted.

TABLE 2 (Cont'd)

ZONING BY-LAW PROVISIONS

PROVISIONS	MARKHAM	MISSISSAUGA
Number of Zones	. 5	. 7
Specific Exclusions	. Repair and servicing of internal combustion engines, motor vehicles and similar uses and any obnoxious use or heavy industrial use.	. Toxic waste disposal sites.
Allowable Coverage	. Depends on parking and yard requirements.	. Depends on parking and yard requirements.
Percentage of Office Space Permitted	. 100%	. 100%
Percentage of Retail Space Permitted	. Up to 30% of gross floor area for ancillary retail sales.	. 15% to 25% of the gross leasable area for ancillary retail sales in buildings larger than 610 sq. ft.
Parking	. One parking space for each 430 sq. ft. of GFA; for buildings over 32,292 sq. ft., one parking space for each 1,076 sq. ft. of GFA over 32,292 sq. ft. and one parking space for each 2,153 sq. ft. of GFA over 64,584 sq. ft.	. 1.6 spaces per 1,076 sq. ft. GFA up to 25,026 sq. ft.; 1.1 spaces per 1,076 sq. ft. GFA between 25,027 sq. ft. and 100,105 sq. ft GFA; 0.6 spaces per 1,076 sq. ft. over 100,106 sq. ft.
Loading	. 1 - 0-20,021 sq. ft. of GFA 2 - 20,022 sq. ft. of GFA and above	. 1 - 0-3,014 sq. ft. of GFA 2 - 3,015-80,192 sq. ft. of GFA 3 - 80,193-150,695 sq. ft. of GFA 1 dock for each additional 100,105 sq. ft. GFA or portion thereof.
Landscaping (minimum)	. 20 ft. to 100 ft. abutting the street line shall be used only for landscaped open space.	. None, except when the property fronts on a major road and/or requires site plan approval, then landscaping is determined by the Planning and Recreation Departments.
Outside Storage	. Permitted in the M(CS) zone if accessory to the principal use, subject to: only in rear yard, not closer than 30 ft. to any street line, not greater than 30% of lot area, screened with a solid fence.	. Permitted in M1 zone provided that the area does not exceed 5% of the lot area or 10% of the floor area of the building, whichever is less; the area not closer to street than building; fence of 8 ft. if adjacent to Agricultural, Open Space or Residential zone.

TABLE 3

SITE PLAN CRITERIA

	CALEDON	KANATA
GENERAL OBJECTIVES	• The only policy statements pertain to the Bolton Business Park. The identity of the whole Bolton Settlement, as well as Bolton in the Valley and Core will be differentiated with special landscape elements such as signs, walls, fences, lighting, planting, walkways, parking and street furniture.	• Lands within the designated area shall be used primarily for light prestige-type industrial purposes (including, office manufacturing, assembly, concealed storage, service shops, printers, warehouses and the like) which provide a high level of employment opportunity and shall be used incidentally for commercial, recreational, social and public purposes.
SITE DEVELOPMENT AND BUILDING SITING	• The identity of the Bolton Business Park will be differentiated through the landscape treatment of business park identity features and major roads.	• All buildings shall be designed such that the architectural features of adjacent structures are taken into account and no building design shall detract from the architecture of adjacent buildings due to its massing, proportion, location or its exterior material selection and placement. • In site development landscaping should emerge as a focal point to lessen the visual impact of buildings and paved areas along a streetscape.
ACCESS AND CIRCULATION	• The transportation network will be reinforced by establishing a "theme landscape" which portrays a country flavour for major roads.	• Street layouts shall incorporate desirable landforms and topographical features into their design which can be used as foci for specific landscaped areas.
PARKING AND LOADING SPACES	• Outdoor storage areas and parking areas will be located away from the frontage of collector and local roads. • Coniferous tree rows and groups, and compatible screen fencing will be used to appropriately buffer these areas.	• Parking areas shall generally be associated with internal side and rear lots, however, where parking is permitted in the front or exterior, side yards provisions shall be made to enhance and screen the area through the use of berming, mounding, planting, etc. • Loading areas shall generally be associated with side and rear yards and shall be screened from view but shall not be located in front yards and shall generally not be located in exterior side yards.
LANDSCAPING	• Construction details for planting will be in accordance with the Standards of the Town of Caledon. • Planting will be predominantly located on private lands. Deciduous street trees may, at the Town's discretion, be located on public lands where there is no conflict with Engineering Standards and Municipal Services. • Five Planting Types will be used to address problems associated with identity, privacy and appearance and energy conservation. These types include: Coniferous and Deciduous Tree Groups, and Coniferous Tree Rows; Coniferous Tree Groups, Deciduous Tree Rows, and Deciduous Tree Groups. • Consideration will be given to the preservation and integration of existing woodlots, hedgerows and other natural features with urban development.	• Subject to detailed engineering analysis, existing land slopes shall be generally followed and taken into account in site development. • Sites not graced by an abundance of interesting topographical features shall be augmented by the judicious use of berms, mounds, tree plantings and the like.

Source: Royal LePage Real Estate Services Ltd., Research and Analysis
Building and Planning Departments of each of the Municipalities

TABLE 3 (Cont'd)

SITE PLAN CRITERIA

	MISSISSAUGA	ETOBICOKE
GENERAL OBJECTIVES	. To ensure that industrial development will conform to, or enhance the desired character and image of the city. It is the spatial relationships of building to site and of building to neighbourhood, and the characteristics of the industrial building which are considered important.	. The following industrial lands shall be designated as site plan control areas: 1. lots abutting residential zones; 2. Lots Abutting Public and Private Open Space; 3. Valley and Watercourses as defined in the Lands Development Act 1973.
	. Inherent in the design considerations is the promotion and acceptance of innovative design concepts, and the belief that industrial neighbourhoods should be working environments that are conducive to employee health, recreation and visual amenities.	. Every effort will be made to ensure that industries locating in proximity to residential areas will be those with little or no air and noise pollution potential.
SITE DEVELOPMENT AND BUILDING SITINGS	. All buildings should take into account the natural topography of the land. Soil, sand and gravel should not be removed from the site except for the purpose of building excavations or grading.	. The proposed use shall be compatible with surrounding uses with regard to architecture, traffic and noise generation in peak periods of traffic as compared to adjacent development, lighting and existence of other similar facilities in the immediate vicinity.
	. Building shadows should not impinge upon human activity spaces of neighbouring sites. Grade and finished ground elevations should respect the natural conditions of neighbouring sites. Buildings should not emit elements of pollution which would cause undue hardships to neighbouring sites or buildings.	
	. Design emphasis should be on facades visible to the public from adjacent properties. All sides of the building should have a colour and textural unity. External design should be in harmony and conformity with neighbouring buildings.	
	. The main elevation should be related to the overall street picture. All mechanical equipment should be an integral part of the complete building form.	
	. The size, location and colour of permanent and temporary signs and lettering should be considered as a designed component of the building form.	
ACCESS AND CIRCULATION	. The access points to the neighbourhood should be clearly defined and adequately designed to accommodate the projected traffic volumes; the truck circulation should be separated as much as possible from the general circulation of passenger cars; the design of interchanges and the location of individual site access points should provide for traffic flows of all modes of transportation; the internal circulation in the neighbourhood should have a simple and understandable form so that traffic can quickly reach its destination and visitors are not confused; on-street parking should be discouraged.	. As deemed appropriate by the various departments within the City of Etobicoke.
PARKING AND LOADING SPACES	. Views of the parking lot from grade and from within the building should be considered when siting parking lots.	. On-site parking shall be provided at a minimum ratio of one space per four persons capacity, in addition to which, space should also be available in the vicinity to accommodate any overflow parking that may be required for special events.
	. Fire Department requirements shall be incorporated as part of the site design.	
	. Lighting should be of sufficient quantity and of good design so as to promote safety and the functional use of the parking lot.	. Loading spaces on an industrial lot have to be provided in accordance with certain square footage requirements as outlined in the Zoning By-Law for the City of Etobicoke.
	. Access points to parking lots should be well spaced and clearly defined. Elements within the streetscape should be functional as well as unifying.	
LANDSCAPING	. Provide a landscaped buffer zone if an industrial landscape should be preserved in areas that are not excavated for the erection of the building or areas used for parking.	. As deemed appropriate by the various departments within the City of Etobicoke.
	. New landscaping should compliment the existing natural environment. Minimize the impact of surface parking area with landscaping.	
	. Provide a variety of colour and texture through the use of different plant materials and surface coverings. Use building form and landscaping materials to clarify pedestrian access points to the site and the building.	

TABLE 3 (Cont'd)

SITE PLAN CRITERIA

	CAMBRIDGE	MARKHAM
GENERAL OBJECTIVES	• Within the 401 Industrial Corridor, the goal is to create a high quality industrial environment that will satisfy the profile needs of prestige industry. All development within the 401 Industrial Corridor shall further this goal.	• Every development shall be compatible with adjacent and area development. No use or feature noxious to adjacent development shall be permitted. Natural features, plants and topography shall be respected and incorporated into the development whenever possible.
SITE DEVELOPMENT AND BUILDING SITINGS	• The concept of an attractive industrial campus may be best realized through the integration of developed areas with expansive landscaped open areas. Such may be created through large building setbacks from streets and relatively small building coverages.	• No building shall generally project beyond any existing adjacent building. No building shall be closer to any property line or any other prime building than half its actual height.
	• The design of all buildings should further the objective of high profile and tasteful industrial area. It is therefore suggested that exterior materials such as cement block be discouraged on those facades oriented toward any public thoroughfare. No operations associated with the industry (other than storage) shall be located outside the building.	• Separated or detached parts of one building shall be joined by useable interior space and be designed as part of the total project. Site improvements and features shall match and compliment features on adjacent properties, particularly in abutting yards.
	• Industries which by their inherent nature are potentially offensive in terms of appearance, odour, dust, noise, smoke, vibration or refuse matter, shall undertake whatever measures are necessary to eliminate the offence in a manner respective of the goal of a high quality environment.	• Elements jointly used by contiguous properties must be secured by approved agreements which are to be registered on title. No building construction is to take place below the rim of ravines, valleys, or watercourses.
ACCESS & CIRCULATION	• The periphery of all parking areas shall be defined by poured concrete curbing, curb stops, secured railroad ties or similar treatment. No portion of any driveway shall be located within 25 feet of the street line of an intersecting minor street or within 50 feet of the street line of any intersecting major street.	• Direct access onto major arterial roads shall not be allowed if alternate access is available. Street access shall be located at a minimum distance of 80 feet from any street corner. Access driveways should be aligned directly opposite each other if possible.
	• Each property which fronts onto a City road shall be limited to the following number of driveway approaches: up to the first 250 feet of frontage - not more than two; and for each additional 250 feet of frontage - not more than two.	• Minimum width of access driveways is to be 75 feet if used by commercial vehicles. Minimum curb radius for commercial vehicle routes shall be 20 feet. Access driveway pavement width exceeding 30 feet is to have a central median of a minimum one metre in width.
		• All access driveways are to be curbed. Minimum on-site driveway width is to be 25 feet for two-way traffic and 13 feet for one-way. Driveways with 20 feet minimum width for two-way and 10 feet for one-way will be allowed if intended to serve passenger vehicle parking areas only.
PARKING & LOADING SPACES	• No loading space will be required where the building floor area is less than 3000 square feet. A loading space of at least 10 feet wide by 33 feet long by 14 feet high shall be provided for every 20,000 square feet of building floor area or fraction thereof.	• The parking requirements of the Zoning By-Law are to be provided in useable spaces, properly surfaced and demarcated. One parking space in every 100 shall be reserved and marked for the handicapped and located convenient to the main entrance.
LANDSCAPING	• Outside storage shall be totally screened from view by a solid barrier (i.e. fence, wall) and landscaping or by a change in elevation.	• Loading doors and docks shall not face any street. A loading space of 12 feet in width and 40 feet in length shall be provided in front of all loading docks. Loading spaces shall not encroach onto driveways, landscaped or pedestrian circulation areas.
	• The objective of a high quality setting may be best realized through adherence to a consistent signage and landscaping theme. All wiring shall be underground.	• A minimum 20 foot wide landscaped area is required. Screening to maintain privacy will be required adjacent to residential property. Acceptable forms of screening may include a solid fence or wall 6 feet high, and high branching deciduous trees.
	• Where any industrial development abuts any residential development, park, public open space, pedestrian walkway, school or institutional use, a buffer strip shall be erected. The buffer strip shall in all cases consist of a fence or wall adjacent to the property line and, where siting and form considerations warrant further buffering, the fence or wall shall be supplemented by trees or shrubs.	• For industrial development, a 5 foot wide landscaped area will be required along the side property lines, extending back from the street line a minimum distance of 20 feet or to the main wall of the building, whichever is greater.

APPENDIX 2

INDUSTRIAL SECTORAL CHANGE

TABLE 1
INDUSTRIAL SECTORAL CHANGE
ONTARIO

SIC	IND		PERCENT			NUMERIC		
			74-79	79-84	74-84	74-79	79-84	74-84
01-09	AGR,FOR FISH	FIRM	51.9	44.5	119.5	1045	1362	2407
		EMPLY	41.2	21.8	72	5931	4440	10371
10-14	MIN	FIRM	0.7	8.4	9.2	5	62	67
		EMPLY	-16.5	64	37	-5467	17762	12295
15-19	CONST	FIRM	24.3	10.7	37.6	3895	2141	6036
		EMPLY	-4.1	-14.4	-18	-7201	-24108	-31309
20-39	MANU	FIRM	21.3	2.3	24.1	3535	461	3996
		EMPLY	17.1	-12.7	2.2	142823	-124683	18140
40-49	TRAN,COMM PUBUT	FIRM	39.6	10.8	54.7	2016	769	2785
		EMPLY	35.3	3.2	39.6	37603	4616	42219
50-51	WHOLESL	FIRM	28.4	13.9	46.2	3591	2250	5841
		EMPLY	25.7	2.5	28.8	38916	4734	43650
52-59	RETAIL	FIRM	7	4.1	11.5	3262	51	5310
		EMPLY	15.7	5.6	22.1	49155	-3794	69351
60-69	FIN,INS REAL EST	FIRM	107.5	44.1	138.6	5284	1529	6813
		EMPLY	-0.9	4.1	0.1	-1892	2028	136
70-89	SERV	FIRM	68.2	15.5	94.3	13267	5066	18333
		EMPLY	79.5	18.4	112.6	251046	104480	355526
90-98	GOVT	FIRM	771.4	38.2	1104.1	378	163	541
		EMPLY	979.9	-5.9	916.5	205234	-13291	191943
	TOTAL	FIRM	29.3	9.9	42.1	32278	15851	52129
		EMPLY	32.8	-0.1	32.6	716148	-3826	712322

Source: Dun & Bradstreet Canada Limited

Research and Special Projects Branch

TABLE 2
INDUSTRIAL SECTORAL CHANGE
CASE STUDY MUNICIPALITIES

CALEDON

SIC	IND		PERCENT			ABSOLUTE		
			74-79	79-84	74-84	74-79	79-84	74-84
01-09	AGR,FOR	FIRM	50	22.2	83.3	6	4	10
	FISH	EMPLY	26.2	-14.6	7.7	17	-12	5
10-14	MIN	FIRM	-50	0	-50	-1	0	-1
		EMPLY	400	-34	230	40	-17	23
15-19	CONST	FIRM	80.4	9.6	97.8	37	8	45
		EMPLY	18.8	1.8	20.9	54	6	60
20-39	MANU	FIRM	117.6	21.6	164.7	40	16	56
		EMPLY	141.6	-4	132	718	-49	669
40-49	TRAN,COMM	FIRM	23.5	76.2	117.6	4	16	20
	PUBUT	EMPLY	41.1	78.1	151.4	44	118	162
50-51	WHOLESL	FIRM	100	32.5	165	20	13	33
		EMPLY	83.9	-5.1	74.5	125	-14	111
52-59	RETAIL	FIRM	47	35.5	89.2	39	35	74
		EMPLY	63	75.6	104.1	216	141	357
60-69	FIN,INS	FIRM	700	-23.5	160	12	-4	8
	REAL EST	EMPLY	1600	-21.6	185.7	37	-11	26
70-89	SERV	FIRM	127.3	21.3	175	42	16	48
		EMPLY	234.9	33.4	346.8	256	122	378
90-98	GOVT	FIRM	0	100	100	0	1	1
		EMPLY	0	25700	25700	0	257	257
	TOTAL	FIRM	79	24.4	122.6	199	110	309
		EMPLY	94.7	17.5	128.7	1507	541	2048

Source: Dun & Bradstreet Canada Limited

Research and Special Projects Branch

CAMBRIDGE

SIC	IND		PERCENT 74-79	PERCENT 79-84	PERCENT 74-84	ABSOLUTE 74-79	ABSOLUTE 79-84	ABSOLUTE 74-84
01-09	AGR,FOR FISH	FIRM	43.8	47.8	112.5	7	11	18
		EMPLY	34	21.2	62.3	73	61	134
10-14	MIN	FIRM	50	0	50	1	0	1
		EMPLY	114.3	-28.9	52.4	24	-13	11
15-19	CONST	FIRM	9.7	20	29.8	12	25	37
		EMPLY	4.6	23.8	0.5	40	-36	4
20-39	MANU	FIRM	20.5	6.7	28.6	46	18	64
		EMPLY	14.4	-11.9	0.7	2116	-2009	107
40-49	TRAN,COMM PUBUT	FIRM	20	73.8	108.6	7	31	38
		EMPLY	59.7	38.9	121.8	293	305	598
50-51	WHOLESL	FIRM	22.7	34.3	64.8	20	37	57
		EMPLY	11.9	61.8	81.1	83	483	566
52-59	RETAIL	FIRM	-5.6	4.8	-1	-22	18	-4
		EMPLY	34.3	7.5	44.4	831	245	1076
60-69	FIN,INS REAL EST	FIRM	163.6	-8.6	140.9	36	-5	31
		EMPLY	365.4	-24.2	252.8	1889	-582	1307
70-89	SERV	FIRM	75.4	25.2	119.6	104	61	165
		EMPLY	131.6	74.5	304.2	1299	1703	3002
90-98	GOVT	FIRM	300	100	600	3	3	6
		EMPLY	1/800	370.2	83700	178	659	837
	TOTAL	FIRM	21.1	16.1	40.6	220	204	424
		EMPLY	32.6	2.9	36.5	6826	816	7642

ETOBICOKE

SIC	IND		PERCENT			ABSOLUTE		
			74-79	79-84	74-84	74-79	79-84	74-84
01-09	AGR,FOR FISH	FIRM	93.3	27.6	146.7	14	8	22
		EMPLY	33.8	50	124.7	52	140	192
10-14	MIN	FIRM	-9.1	50	36.4	-1	5	4
		EMPLY	3.7	-29.4	-26.8	3	-25	-22
15-19	CONST	FIRM	33.5	3.1	37.6	180	22	202
		EMPLY	3.8	-14.4	-11.6	268	-1045	-777
20-39	MANU	FIRM	19	-6.6	11.1	179	-74	105
		EMPLY	37.4	-33.2	-8.2	18143	-22134	-3991
40-49	TRAN,COMM PUBUT	FIRM	32.2	1.8	34.6	67	5	72
		EMPLY	11	0.6	11.7	795	49	844
50-51	WHOLESL	FIRM	20.9	6.3	28.5	188	68	256
		EMPLY	26.4	-2.3	23.5	3768	-416	3352
52-59	RETAIL	FIRM	12.2	-3.2	11.9	136	-3	133
		EMPLY	12.8	38.1	24.6	1358	1252	2610
60-69	FIN,INS REAL EST	FIRM	98.1	37.9	122.8	211	53	264
		EMPLY	-69.9	248.1	-20.9	-11394	6988	-3406
70-89	SERV	FIRM	79.1	10.3	97.4	525	122	647
		EMPLY	97.9	0.2	98.3	13081	46	13127
90-98	GOVT	FIRM	400	-70	50	8	-7	1
		EMPLY	41440	-7.7	3824	2072	-160	1912
	TOTAL	FIRM	32.9	3.7	37.8	1518	228	1746
		EMPLY	23.9	-9.8	11.8	28146	-14305	13841

KANATA

SIC	IND		PERCENT 74-79	PERCENT 79-84	PERCENT 74-84	ABSOLUTE 74-79	ABSOLUTE 79-84	ABSOLUTE 74-84
01-09	AGR,FOR FISH	FIRM		100			1	
		EMPLY		600			6	
10-14	MIN	FIRM		0			0	
		EMPLY		-20			-5	
15-19	CONST	FIRM		83.3			10	
		EMPLY		25.6			23	
20-39	MANU	FIRM		76.5			13	
		EMPLY		322.5			4289	
40-49	TRAN,COMM PUBUT	FIRM		66.7			2	
		EMPLY		34.6			9	
50-51	WHOLESL	FIRM		140			7	
		EMPLY		109			73	
52-59	RETAIL	FIRM		188.2			32	
		EMPLY		167.5			206	
60-69	FIN,INS REAL EST	FIRM		166.7			10	
		EMPLY		154.4			105	
70-89	SERV	FIRM		135			27	
		EMPLY		90.3			93	
90-98	GOVT	FIRM		0			0	
		EMPLY		-20			-15	
	TOTAL	FIRM		133.7			111	
		EMPLY		250.7			4784	

MARKHAM

SIC	IND		PERCENT			ABSOLUTE		
			74-79	79-84	74-84	74-79	79-84	74-84
01-09	AGR,FOR FISH	FIRM	144.4	47.7	261.1	26	21	47
		EMPLY	26.3	31.1	65.6	49	73	122
10-14	MIN	FIRM	0	50	50	0	1	1
		EMPLY	157.1	-44.4	42.9	11	-8	3
15-19	CONST	FIRM	62	26.5	105	137	95	232
		EMPLY	44.8	21.5	76	1154	803	1957
20-39	MANU	FIRM	123	20.3	168.3	283	104	387
		EMPLY	70.9	74.8	198.6	3639	6558	10197
40-49	TRAN,COMM PUBUT	FIRM	155.6	18.8	203.7	42	176	55
		EMPLY	534.6	-2.4	519.7	1577	2225	1533
50-51	WHOLESL	FIRM	155	62.6	314.8	262	270	532
		EMPLY	201.3	77.3	434.2	2704	3127	5831
52-59	RETAIL	FIRM	68.9	58.9	168.4	142	205	347
		EMPLY	72.1	68.6	190.2	1094	1792	2886
60-69	FIN,INS REAL EST	FIRM	292.9	106.5	625	82	93	175
		EMPLY	255.4	298.4	987.7	498	1428	1926
70-89	SERV	FIRM	193.3	69	395.5	259	271	530
		EMPLY	226.4	50.1	390	2570	1856	4426
90-98	GOVT	FIRM	200	-50	100	2	-1	1
		EMPLY	25500	-2	25000	255	5	250
	TOTAL	FIRM	120	48.3	226.7	1245	1101	2346
		EMPLY	111.4	58.5	235.2	13801	15331	29132

MISSISSAUGA

SIC	IND		PERCENT 74-79	PERCENT 79-84	PERCENT 74-84	ABSOLUTE 74-79	ABSOLUTE 79-84	ABSOLUTE 74-84
01-09	AGR,FOR FISH	FIRM	73.8	27.4	121.4	31	20	51
		EMPLY	21	10.9	34.2	89	56	145
10-14	MIN	FIRM	62.5	50	0	5	3	8
		EMPLY	-43.7	-92.9	-97.2	-210	-92	-302
15-19	CONST	FIRM	63	24.3	102.7	237	149	386
		EMPLY	26.8	10.2	39.8	1238	599	1837
20-39	MANU	FIRM	77.7	25.1	122.3	558	320	878
		EMPLY	19.6	19.9	43.4	6255	7620	13875
40-49	TRAN,COMM PUBUT	FIRM	87.3	30.9	145.2	172	114	286
		EMPLY	64	23.5	102.5	3365	2023	5388
50-51	WHOLESL	FIRM	93.9	43.5	178.2	557	500	1057
		EMPLY	70.6	38.5	136.2	6059	6535	11694
52-59	RETAIL	FIRM	35.9	22.5	66.5	268	228	496
		EMPLY	69.1	19.2	101.5	3814	1789	5603
60-69	FIN,INS REAL EST	FIRM	124.5	41	216.5	173	128	301
		EMPLY	101.6	116.2	335.9	1409	3250	4659
70-89	SERV	FIRM	167.6	36.1	264.2	684	394	1078
		EMPLY	129.7	74.5	300.8	6660	8780	15440
90-98	GOVT	FIRM	700	42.9	1000	7	3	10
		EMPLY	762800	-7.7	704000	7628	-588	7040
	TOTAL	FIRM	84	31.5	142	2710	1872	4582
		EMPLY	57.3	29.2	103.2	36307	29072	65379

TABLE 3

INDUSTRIAL GROWTH AND DECLINE BY MAJOR SECTORS

ONTARIO

Industry	Gain or Loss (1974-1984)	Size Category
Manufacturing		
Food	-27	250+
	-3,072	
Apparel	214	250+
	4,078	
Printing	502	0-9
	14,329	50-250+
Chemicals	88	0-9
	7,032	250+
Rubber/Plastics	199	0-9
	-7,614	250+
Leather	22	0-9
	-4,002	100+
Prim Metal	117	0-9
	-2,053	250+
Fabricated Metal	449	0-9
	-2,074	250+
Machinery	752	gains in all
	12,097	sizes
Electrical Equipment	371	0-9
	-3,878	250+
Transportation & Communication		
Local Pass Trains	142	0-9
	8,047	100+
Trucking/whse	1,171	0-9
	7,942	0-9, 100+
Transportation Services	990	0-9
	6,690	0-9
Elec, Gas, Sanitation	222	0-9
	16,749	250+
Wholesale		
Wholesale Durables	3,715	0-9
	28,913	0-9
Wholesale Non-Durables	2,126	0-9
	14,737	0-9

Source: Dun & Bradstreet Canada Ltd.

Royal LePage Real Estate Services Ltd.
Research & Analysis

ONTARIO (Cont'd)

Industry	Gain or Loss	Size Category
Retail		
Food Stores	-45	
	7,106	10-49
Auto Dealers	-1,708	
	-5,800	0-9
Eating/Drinking Places	2,849	0-19
	49,966	0-99
Miscellaneous Retail	2,554	
	10,949	0-9
Financial/Insurance/Real Estate		
Banking/Trust	145	10-19
	12,096	250+
Insurance Companies	281	0-9
	13,753	100+
Insurance Agents	1,088	
	11,036	0-9
Real Estate	2,884	
	15,557	0-9
Holding, Real Estate, Invest.	2,319	0-9
	-61,311	250+
Services		
Business Services	6,798	0-9
	64,792	0-19, 250+
Medical/Health	923	0-9
	94,070	250+
Education Services	562	0-9
	87,938	250+
Government		
Provincial Government	91	0-9
	85,988	250+
Pub. Fin./Taxes	314	
	79,195	250+

TABLE 4

INDUSTRIAL GROWTH AND DECLINE BY MAJOR SECTORS - CASE STUDY MUNICIPALITIES

CALEDON

Industry	Gain/Loss	Size
Manufacturing		
Lumber	4	
	97	30-49
Rubber/Plastics	6	
	135	100-249
Prim Metal	6	
	84	0-9, 50-99
Machinery	11	0-9
	266	250+
Transportation		
Trucking/Whse	17	0-9
	148	50-99
Wholesale		
Wholesale/Durables	24	
	66	0-9
Retail		
Food Stores	8	
	56	0-9
Eating/Drinking	12	
	67	0-9
Miscellaneous Retail	24	
	96	0-9
Services		
Business Services	18	
	52	0-9
Auto Repair	19	
	106	0-9
Medical/Health	3	
	101	30-99
Government		
Public Fin/Taxes	1	
	257	250+

Source: Dun & Bradstreet Canada Ltd.

Royal LePage Real Estate Services Ltd.
Research & Analysis

CAMBRIDGE

Industry	Gain/Loss	Size
Manufacturing		
Food	4	20-29
	230	250+
Textile	-1	
	-930	250+
Apparel	4	
	201	100-249
Leather	4	
	-523	250+
Chemicals	-5	
	-149	losses in all categories
Furniture	-3	
	-124	100+
Printing	-4	
	-201	100-249
Machinery	21	
	1,217	250+
Electricity Equipment	8	
	643	100+
Transportation & Communication		
Trucking/Warehouse	25	0-9
	433	50-249
Wholesale		
Durables	12	0-9
	206	
Non Durables	57	
	566	100-249
Retail		
Apparel Accessories	5	0-9
	242	100-249
Eating/Drinking	8	30-49
	573	
Finance/Insurance/Real Estate		
Holding, Real Estate, Investment	14	0-9
	1,242	250+
Services		
Business Services	36	0-9
	695	100-249
Medical Health	14	0-9
	1,769	250+
Government		
Public Finance/Taxes	5	
	787	250+

ETOBICOKE

Industry	Gain/Loss	Size
Manufacturing		
Food	16	0-9
	-2,266	250+
Paper	14	
	1,040	100-249
Printing	28	0-9
	1,216	50+
Fab Metal	-1	
	-1126	100-249
Machinery	-13	
	-1436	100-249
Transportation Equipment	8	
	-799	250+
Transportation Services		
Trucking/Warehouse	-6	
	-2,247	100+
Transportation Services	61	0-9
	1,026	250+
Communication	4	
	1,447	250+
Wholesale		
Durables	135	0-9
	1,833	100-249
Non-Durables	121	0-9
	1,519	100-249
Retail		
Auto Dealers, Serv. Station	-39	0-9
	-497	100-249
Eating/Drinking	59	
	622	0-19
Miscellaneous Retail	26	0-9
	1,427	250+
Finance, Insurance, Real Estate		
Real Estate	105	
	743	0-9
Services		
Bus. Services	251	0-9
	3,222	250+
Amusement, Recreation	31	0-9
	1,425	250+
Medical/Health	2/	0-9
	1,532	250+
Education Services	15	
	6,080	250+
Government		
Federal	2	
	1,915	250+

KANATA (1979-1984)

Industry	Gain or Losses	Size Category
Manufacturing		
Furniture	-1	
	-30	30-49
Chemicals	2	
	993	250+
Machinery	1	
	350	250+
Electrical Equipment	7	
	2,750	250+
Instruments	1	
	113	100-249
Retail		
Eating/Drinking	13	
	118	0-29
Finance/Insurance/Real Estate		
Real Estate	7	
	57	0-29
Services		
Business Services	16	0-9
	48	
Government		
Pub. Finance/Taxes	1	
	60	50-99

MARKHAM

Industry	Gain/Loss	Size
Manufacturing		
Printing	81	
	1,021	0-9
Machinery	74	0-9
	3,035	250+
Electric Equipment	45	0-9
	2,744	250+
Transportation Equipment	-1	
	-67	50-59
Transportation		
Local Pass Trains	6	
	786	250+
Trucking/Whse	22	0-9
	296	30-49
Wholesale		
Wholesale Durables	366	0-9
	4,328	
Non Durables	166	0-9
	1,503	
Retail		
Food Stores	20	
	249	0-19
Auto Dealers, Service Station	13	
	259	30-49
Furniture	72	
	407	0-9
Eating/Drinking	64	0-9
	1,129	50-99
Miscellaneous Retail	111	
	889	0-9
Finance/Insurance/Real Estate		
Credit Agencies	9	
	722	250+
Real Estate	58	
	462	0-9
Holding Company Investment	81	0-9
	636	
Services		
Business Services	245	0-9
	2,400	
Auto Repair, Garages	80	
	320	0-9
Medical/Health	12	
	330	50-99
Government		
Public Finance/Taxes	1	
	250	250+

MISSISSAUGA

Industry	Gain or Losses	Size Category
Food	35	100-249
	1,270	
Printing	83	0-9
	1,114	100-249
Chemicals	60	0-9
	3,177	250+
Petrol/Coal	8	
	-496	250+
Fab Metal	105	
	2,746	100-249
Machinery	186	0-9
	1,415	50-99
Transportation Equipment	21	
	-3,157	250+
Instruments	37	
	1,586	100-249
Transportation		
Trucking/Warehouse	129	0-9
	3,293	250+
Transportation Services	125	
	1,216	0-9
Wholesale		
Durables	754	0-9
	8,179	
Non Durables	303	0-9
	3,515	100-249
Retail		
Food Stores	81	0-9
	730	
Furniture	88	0-9
	961	
Eating/Drinking	144	0-19
	2,277	50-99
Finance/Insurance/Real Estate		
Real Estate	115	
	1,215	0-9
Holding, Real Estate, Inv.	115	0-9
	2,667	250+
Services		
Personal Services	62	0-9
	1,043	100-249
Business Services	484	
	3,974	0-9
Auto Repair/Gar.	216	0-9
	1,577	
Medical/Health	22	100+
	2,337	
Education Services	21	250+
	3,133	
Government		
Public Fin./Taxes	5,026	250+

APPENDIX 3

INDUSTRIAL QUESTIONNAIRES

INDUSTRIAL TRENDS -

IMPLICATIONS FOR MUNICIPAL PLANNING

(QUESTIONNAIRE)

I. GENERAL INFORMATION

1. Year of establishment in municipality: _____

2. Year of establishment in present location, if different from above: _____

3. Type of business: (Please check ✓)

   a. ____ Manufacturing
   b. ____ Warehouse & Distribution
   c. ____ Retail
   d. ____ Service
   e. ____ Wholesale
   f. ____ Some combination of a, b, c, d, e. If f, please specify: _____

4. Number of Employees at this location: _____

5. Number of Buildings at this location: _____

6. Type of use in building: Please specify the approximate percentage of total floor space dedicated to each use.

	BUILDING #1 % of Total Floor Space	BUILDING #2 % of Total Floor Space	BUILDING #3 % of Total Floor Space
a. Manufacturing			
b. Warehouse			
c. Shipping			
d. Retail/Showroom			
e. Office			
f. Other (Specify) _____			
Total floor space (sq. ft.)			

7. Site Area: Please specify approximate percentage of total site area dedicated to:

	% of Total Site Area
a. Parking	
b. Recreation	
c. Future Expansion	
Total site area (Acres)	

Source: Royal LePage Real Estate Services Ltd., Research and Analysis

II. LOCATIONAL CONSIDERATIONS

8. Did you consider other municipalities before choosing this one?

Yes _____ No _____

If yes, which ones?

_____

_____

_____

9. Please check (✓) which of the following factors you considered important in making your location decision, even if they are not present at your location. Then rank the five most important from 1 to 5.

			Ranking
( )	a.	Availability of trained labour force	_____
( )	b.	Wage Rates	_____
( )	c.	Proximity to major markets	_____
( )	d.	Proximity to major suppliers	_____
( )	e.	Proximity to major urban centre	_____
( )	f.	Proximity to university	_____
( )	g.	Availability of good quality buildings to purchase	_____
( )	h.	Availability of good quality space for lease	_____
( )	i.	Availability of short term leases	_____
( )	j.	Cost of leasing	_____
( )	k.	Cost of land	_____
( )	l.	Taxes	_____
( )	m.	Image/Prestige considerations	_____
( )	n.	Presence of other companies similar to yours	_____
( )	o.	Good business/government relations	_____
( )	p.	Financing availability & government incentives	_____
( )	q.	Personal considerations of CEO & other top personnel	_____
( )	r.	Quality of life considerations	_____
( )	s.	Other (Specify) _____	_____
( )	t.	Other (Specify) _____	_____

10. Of the five most important factors you indicated in #9 above, are they all present at your location?

Yes _____ No _____

If not, which ones are not? (indicate by letter)

1. _____ 2. _____ 3. _____ 4. _____ 5. _____

11. Do you own _____ or lease _____ your premises?

12. If you own, did you: 1. _____ build-to-suit

2. _____ buy an existing building

13. If you lease, do you have a short term lease (up to 2 years) _____
or a long term lease (more than two years) _____

III. PHYSICAL REQUIREMENTS

14. Did the municipality meet your requirements with respect to the criteria listed below? (Please check ✓)

	Yes	No	N/A *
a. Availability of suitable designated industrial land to accommodate your			
i) present needs	_____	_____	_____
ii) future needs	_____	_____	_____
b. Servicing capacity	_____	_____	_____
c. Transportation access via: i) road	_____	_____	_____
ii) rail	_____	_____	_____
iii) air	_____	_____	_____
iv) sea	_____	_____	_____

15. Did the municipal planning criteria suit your requirements with respect to the following standards? (Please check ✓)

	Yes	No	N/A *
a. Environmental controls	_____	_____	_____
b. Coverage ratios	_____	_____	_____
c. Permitted uses	_____	_____	_____
d. Setbacks	_____	_____	_____
e. Parking standards	_____	_____	_____
f. Loading standards	_____	_____	_____
g. Storage	_____	_____	_____
h. Landscaping	_____	_____	_____
i. Maximum office space provisions	_____	_____	_____
j. Maximum retail/showroom provisions	_____	_____	_____
k. Adjacent uses	_____	_____	_____
l. Site Plan Control Guidelines	_____	_____	_____
m. Other (Specify)	_____	_____	_____
n. Other (Specify)	_____	_____	_____

If you answered no to any of the foregoing, was it because the standards were:

1) too restrictive _____ Which ones? (indicate by letter) _____

2) not restrictive enough _____ Which ones? _____

Please comment on the nature of the problem. _____

_____

_____

_____

* N/A - Not applicable

IV. APPROVALS PROCESS

16. With respect to those standards which created problems for your firm, did the municipality accommodate you through any one of the following procedures? (Please check ✓)

	Yes	No
a. Official Plan Amendment		
b. Rezoning		
c. Exemptions		
d. Committee of Adjustment		
e. Site Plan Agreement		

If you answered yes to any of the above, was the process handled expeditiously to accommodate your requirements?

Yes _____ No _____

17. Did you have any difficulties in dealing with the municipality during the establishment of your firm in the municipality?

Yes _____ No _____

If so, with which department (please check ✓)

_____ a. Planning
_____ b. Business Development
_____ c. Building
_____ d. Engineering
_____ e. Council

What was the major difficulty?

_____

_____

_____

18. Is there anything else that the municipality could have done in terms of handling the development process or in implementing the planning policies that would have assisted you in locating here?

_____

_____

_____

19. Do you have any other comments?

_____

_____

_____

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Notes